FlowDocs

User's Manual

FlowDocs

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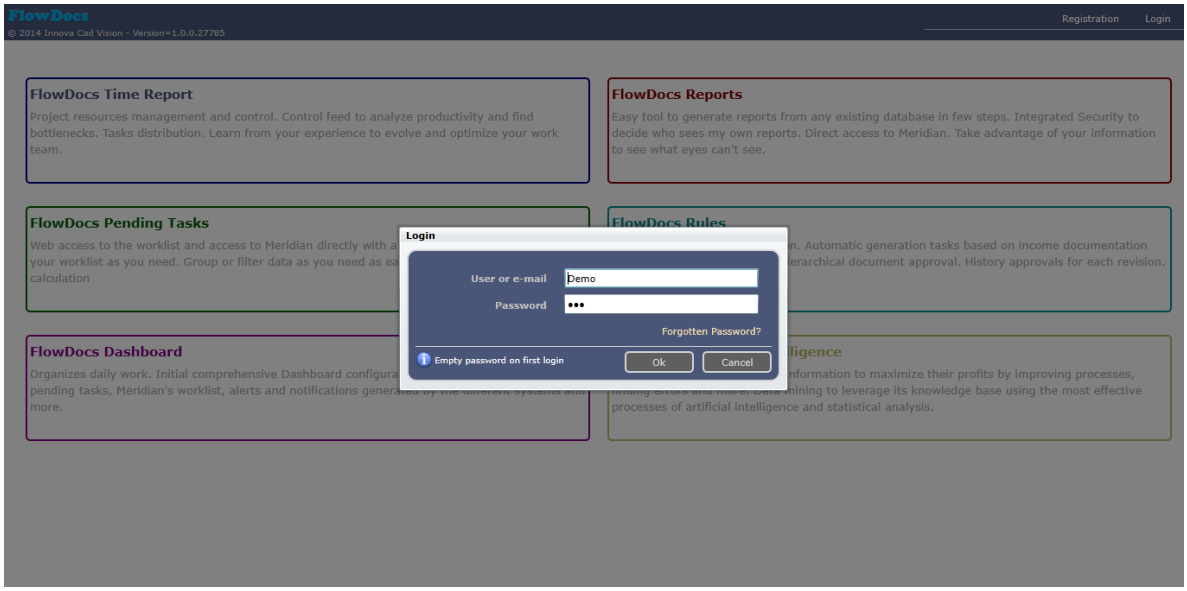
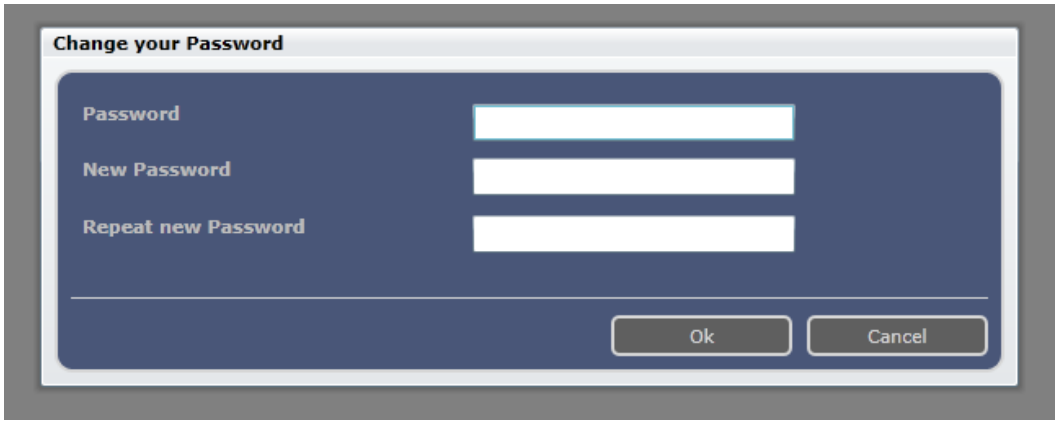
LOGIN

User can login by using his e-mail or user nick that should be the same as domain user.



First Login o after reset password

On first login or after system administrator blank password, user must use empty password on login. The system would required to input the new password after this action.



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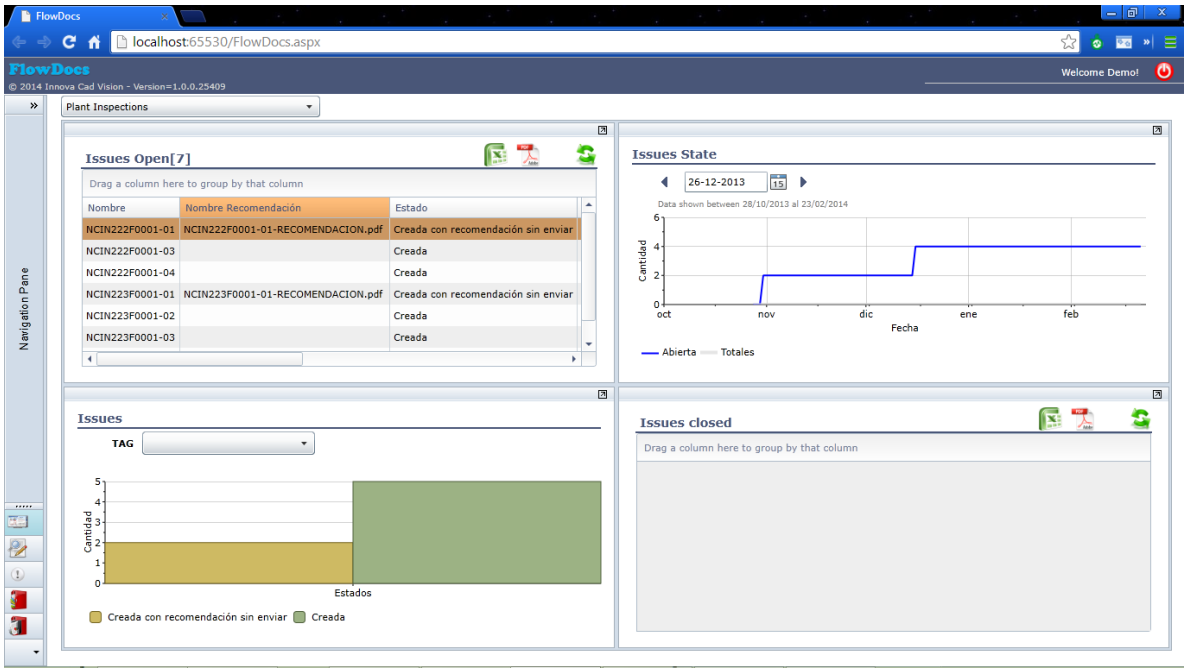
DASHBOARD

After logging in or accessing to Dashboard menu button, user can see the dashboard according given role or roles to him.



The Dashboard is composed by one or more reports. These reports are configure in Reports module and are assigned to user by roles (see reports configuration).

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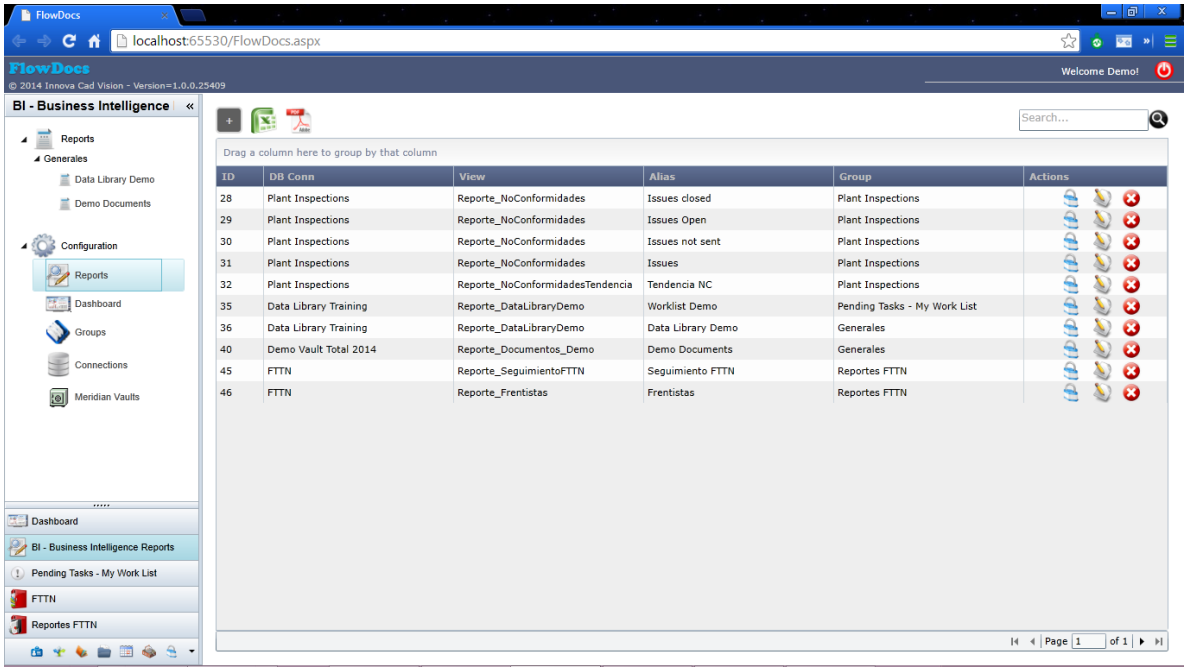
REPORTS

Reports module allows user to create reports easily and in a few steps. First of all user need to configure database access defining database connections.



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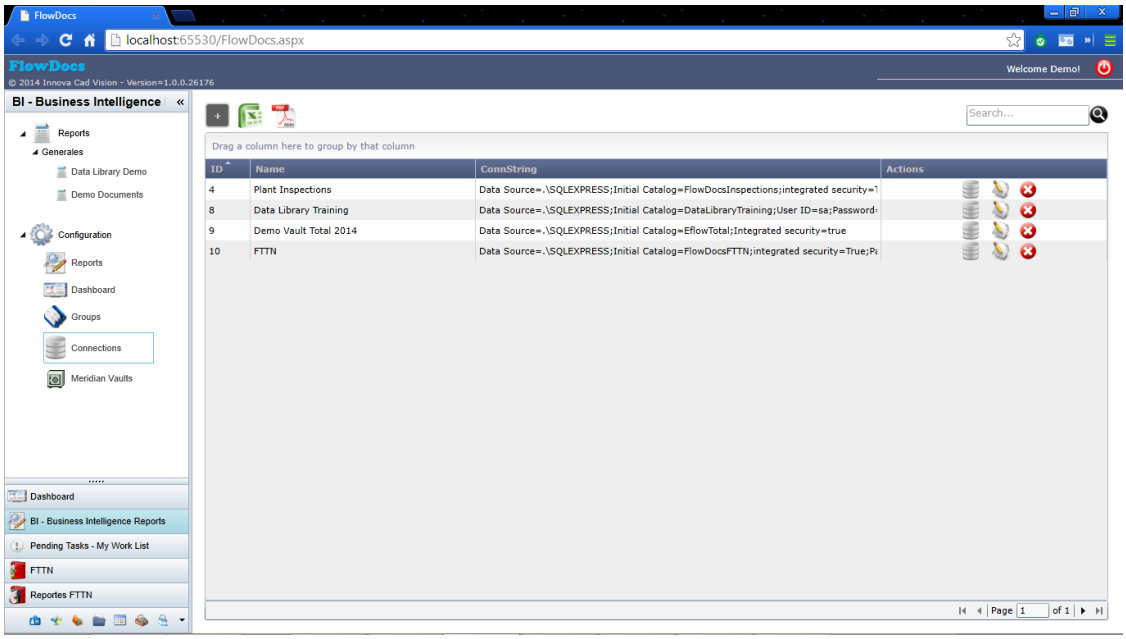
Database Connections

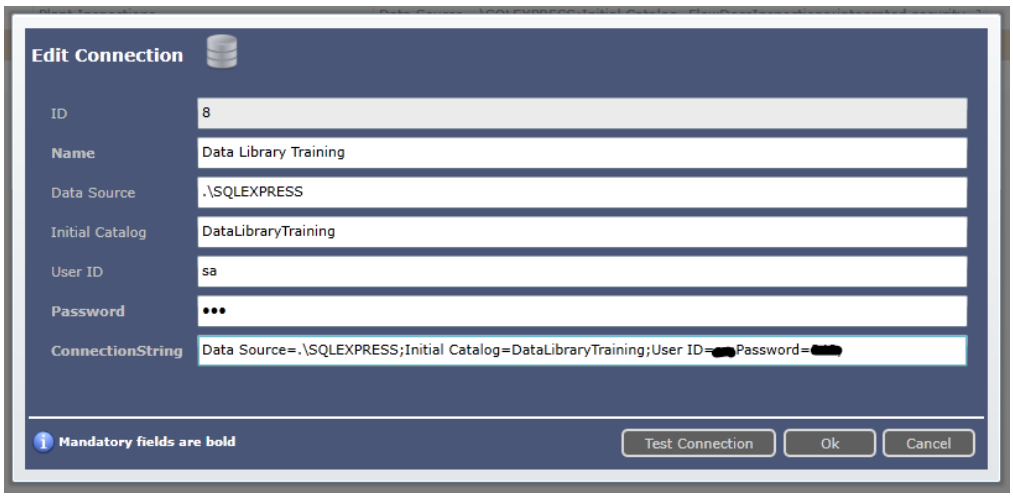
To access database connections, user must click on Connections button

in Reports Configuration menu.



New Database Connection

To create a new connection, user must click on . After this action, new connection window will appear as image shown below. After the user completed required data, must click **ok** button to save changes.



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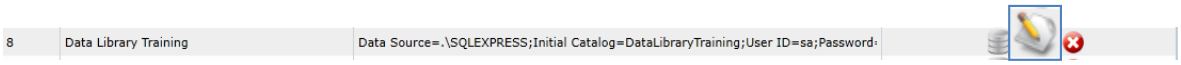
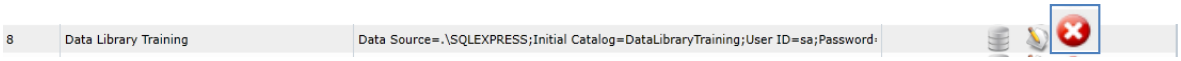
Edit Database Connection

To edit a connection, user must click on edit button in the grid row of the connection to edit. After this action, edit connection window will appear. After the user completed required data, must click ok button to save changes.



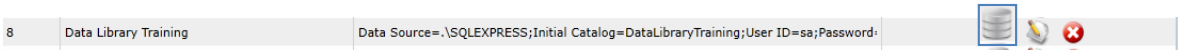
Delete Database Connection

To delete a connection, user must click on **delete** button in the grid row of the connection to delete.



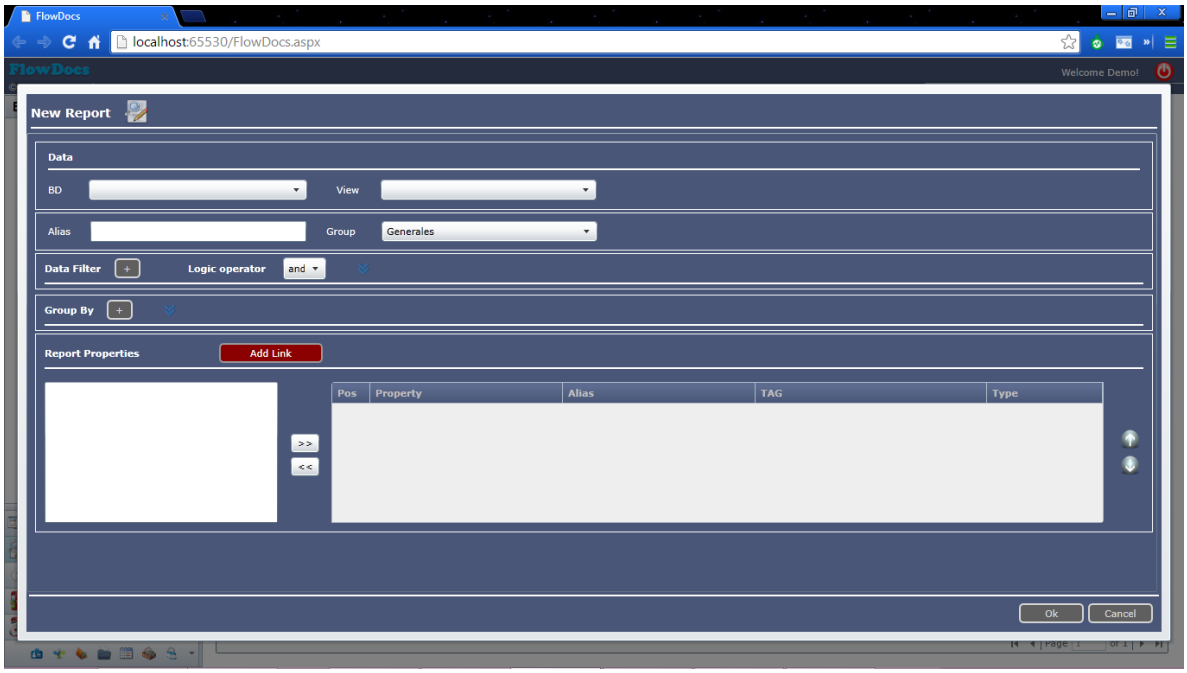
Test Database Connection

To Test a connection, user must click on **Test button** in the grid row of the connection to test.



New Report

To create a new Report, user must click on [+]. After this action, new Report window will appear as image shown below. After the user completed required data, must click **ok** button to save changes.



BD

Is the Database connection to use for the report.

View

Is the view defined in the database to use in the report. By Default, FlowDocs only shows database views with prefix **Report_** (see administrator manual)

Alias

Is the name of the report to show in Menu

Group

Is the group of views defined in **Reports Configuration Group.**

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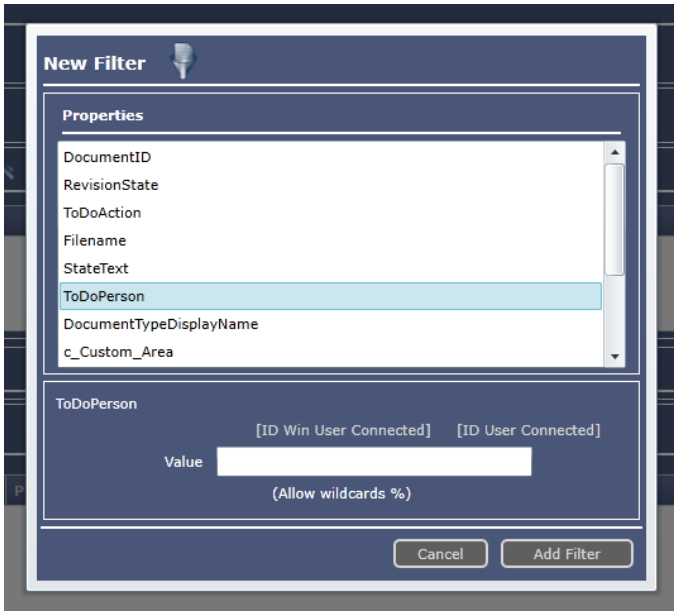
Data Filter Panel

Defines the filters of the views depending on report properties.

Add new Filter

To add a new filter, user must press . After this action, a screen will pop up as image below



Select view property and set the value depending on property type.

Text Property

If the property type is text, user can use wildcards %.

Example:

Property: Filename

Value: %.txt

This filter will make report to show only text files

Text properties Variables

Systems variables to add to filters on execution time

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[ID Win User Connected] This variable depends on the user logged to system. It is user domain ID

[ID User Connected] This variable depends on the user logged to system. It is user FlowDocs ID

Date Property

If the property type is Date, user can use operator to compare dates.

By Specific Date

Dates comparison depends on the specific date entered by user

By number of Days

Dates comparison depends on the report execution date less than days entered by user. **Note:** Days can be negative if report needs to show records with dates after execution date.

Example:

Report: Projects to commit in next 30 days

Filter 1

Property: DateToCommit

Operator: <

Days: -30

Filter 2

Property: DateToCommit

Operator: >

Days: 0

Number Property

If the property type is Number, user can use operator to compare numbers with a constant defined.

Example:

Report: Documents with Revision 0 or 1

Filter

Property: RevisionNumber

Operator: <=

Number: 1

Expand Shrink Data Filter Panel

To expand Data Filter panel press . To Shrink Data Filter Panel press

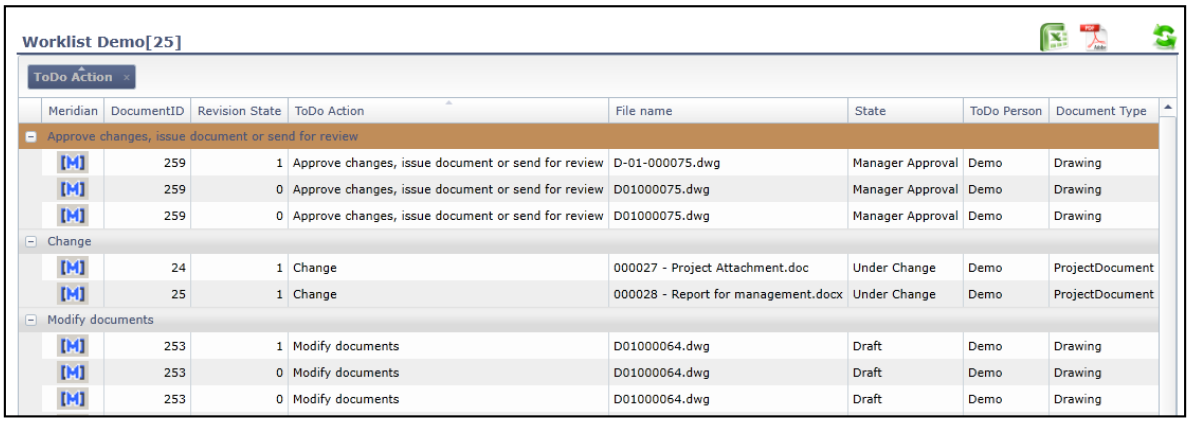
Group By Panel

Defines the properties of the views to Group information.

Add new Property to Group By

To add a new property, user must press . After this action, a screen will pop up as image below. Select a property and press **Add Property** button.

After this, Report will be organize grouping information as defined in configuration phase as image shown below



Meridian	DocumentID	Revision State	ToDo Action	File name	State	ToDo Person	Document Type
Approve changes, issue document or send for review							
[M]	259	1	Approve changes, issue document or send for review	D-01-000075.dwg	Manager Approval	Demo	Drawing
[M]	259	0	Approve changes, issue document or send for review	D01000075.dwg	Manager Approval	Demo	Drawing
[M]	259	0	Approve changes, issue document or send for review	D01000075.dwg	Manager Approval	Demo	Drawing
Change							
[M]	24	1	Change	000027 - Project Attachment.doc	Under Change	Demo	ProjectDocument
[M]	25	1	Change	000028 - Report for management.docx	Under Change	Demo	ProjectDocument
Modify documents							
[M]	253	1	Modify documents	D01000064.dwg	Draft	Demo	Drawing
[M]	253	0	Modify documents	D01000064.dwg	Draft	Demo	Drawing
[M]	253	0	Modify documents	D01000064.dwg	Draft	Demo	Drawing

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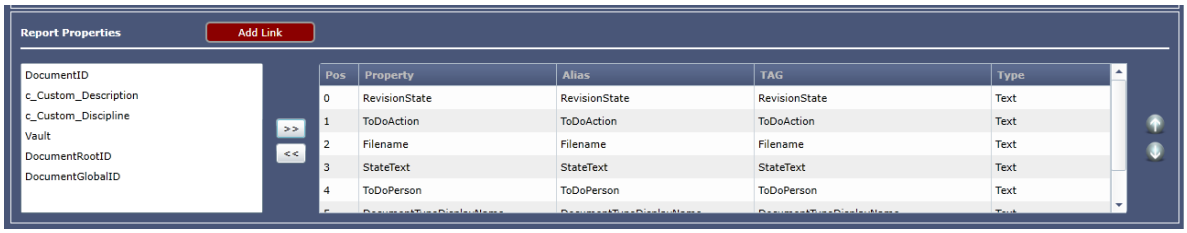
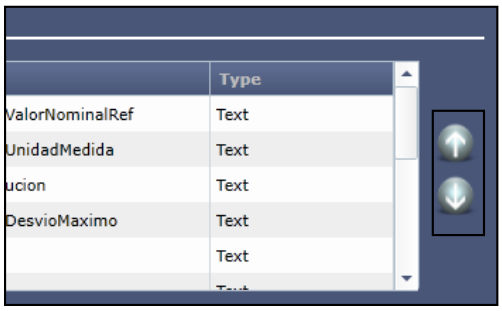
Report Properties

User can select which properties are shown in the report , set columns order and name, create Meridians document link to access to document in Vault, create a link to an external web with one or more properties as parameter.



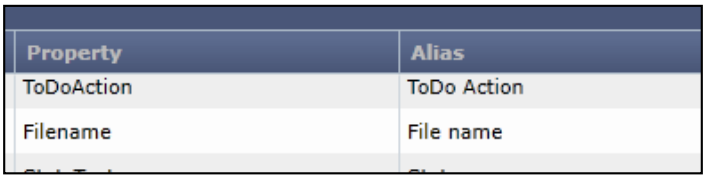
Order columns position

User can select a row in the grid and press on the arrows to move column to desired position



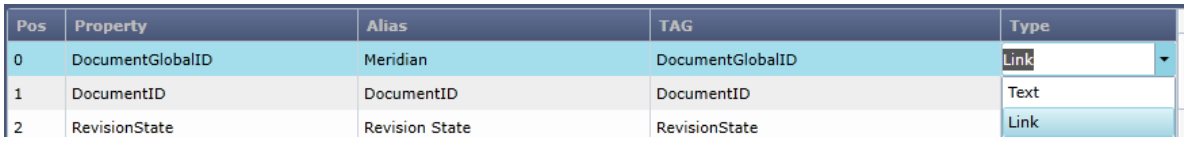
Set column name

User can set name to column modifying Alias field.



Create document link to Meridian

User select grid row of property with Meridian ID and set type as Link.



Condition: The Report must have a property with name **vault** that defines the Vault Name of the document. The Vault must be configured in Vaults section (see Reports Configuration Meridian Vaults).

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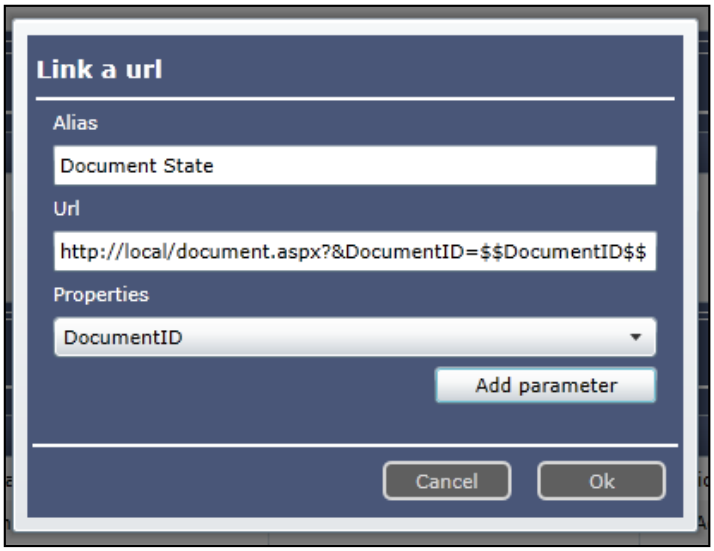
Create Link

User can create a link to an external web. User must press

button and the window will pop up as the image that is shown below.



Alias

Defines the name of the column where the link is show.

Url

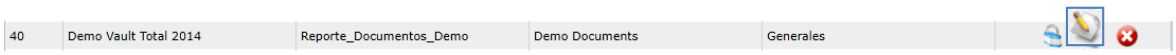
Defines the url to access to external web

Add Parameter

Adds a property as parameter to the url. The parameter name can be edited directly in the url. Value will be replace on execution time. **Note:** Don't change value (Example: $$DocumentID$$) because system will not recognize it before change it in execution time.

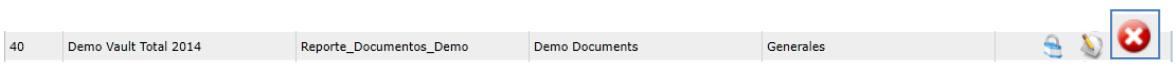
Edit Report

To edit a report, user must click on edit button in the grid row of the report to edit. After this action, edit report window will appear. After the user completed required data, must click ok button to save changes.



Delete Report

To delete a report, user must click on **delete** button in the grid row of the report to delete.



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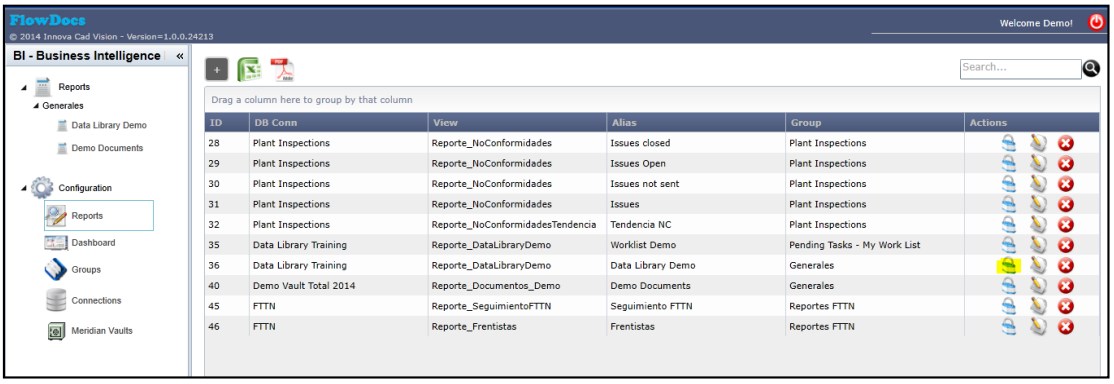
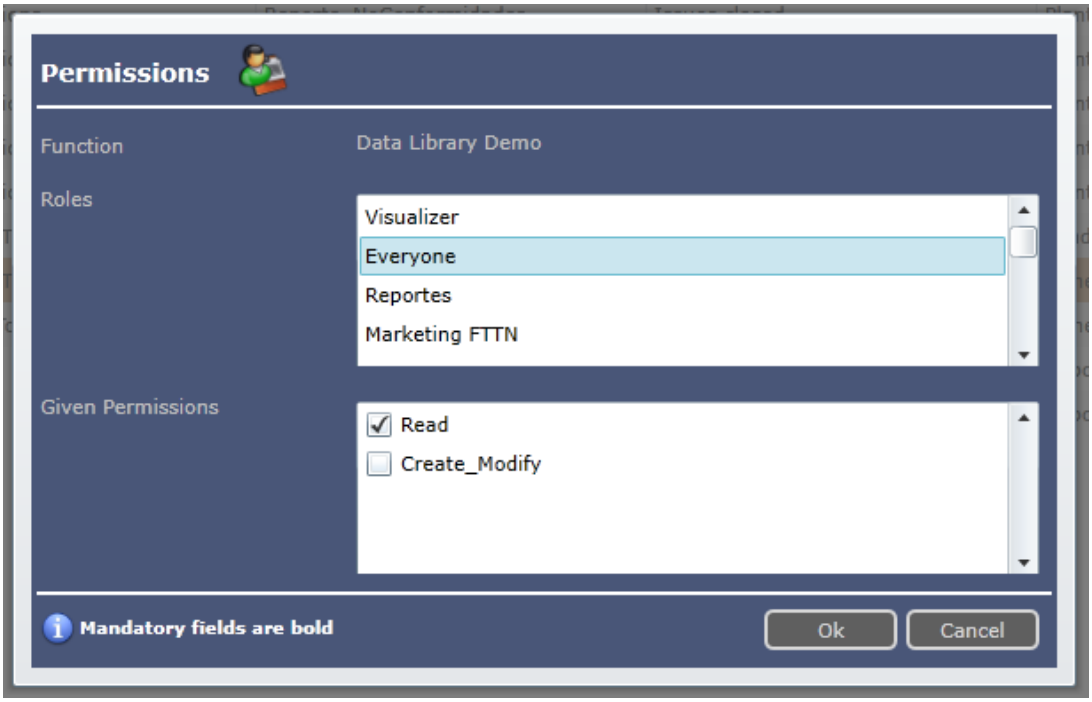
Setting Report Security

User can define which roles can view the report. For this, on report row user must click on to access Report Permissions.



After this action, Report Permissions window will pop up as image below.



Selecting each role, user can define if report can be accessible for the selected role by checking read option. This function is accessible for users that can create/update reports.

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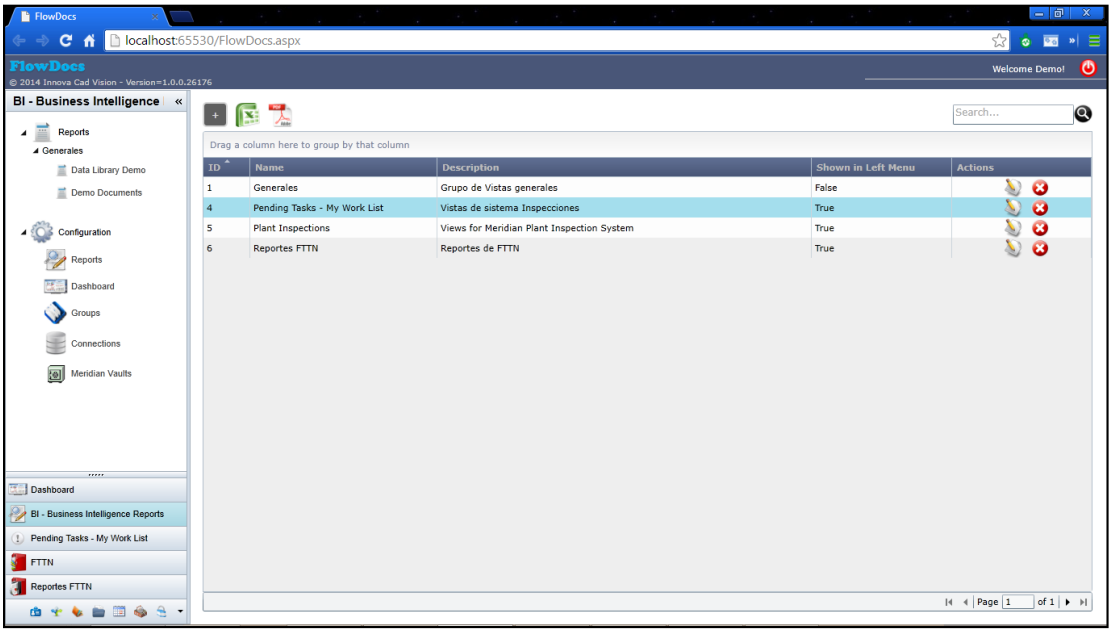
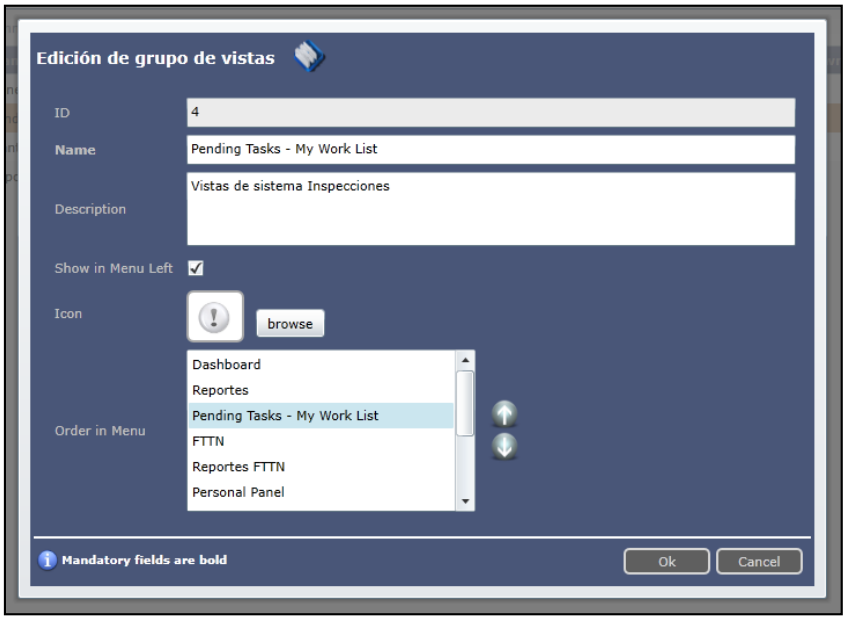
Groups

User can define groups of reports to organize them. Also a group can be an item of the menu left to have access directly to reports. To access to Groups configuration press



New Group

To create a new Group, user must press on . After this action, new Group window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.



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Group in Menu Left

To show the Group as an item of the Menu, User must click on checkbox Show in Menu Left. After this action, user must select an image to use in menu and define the position in menu of the group item.

The result of this action is shown in the image below

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Meridian Vaults Access

User can define a Meridian Vault to access to documents in reports that shows needed information. To access to Meridian Vaults configuration user must press on button.

New Meridian Vault

To create a new Meridian Vault access, user must press on . After this action, new Meridian Vault window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.

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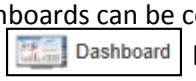
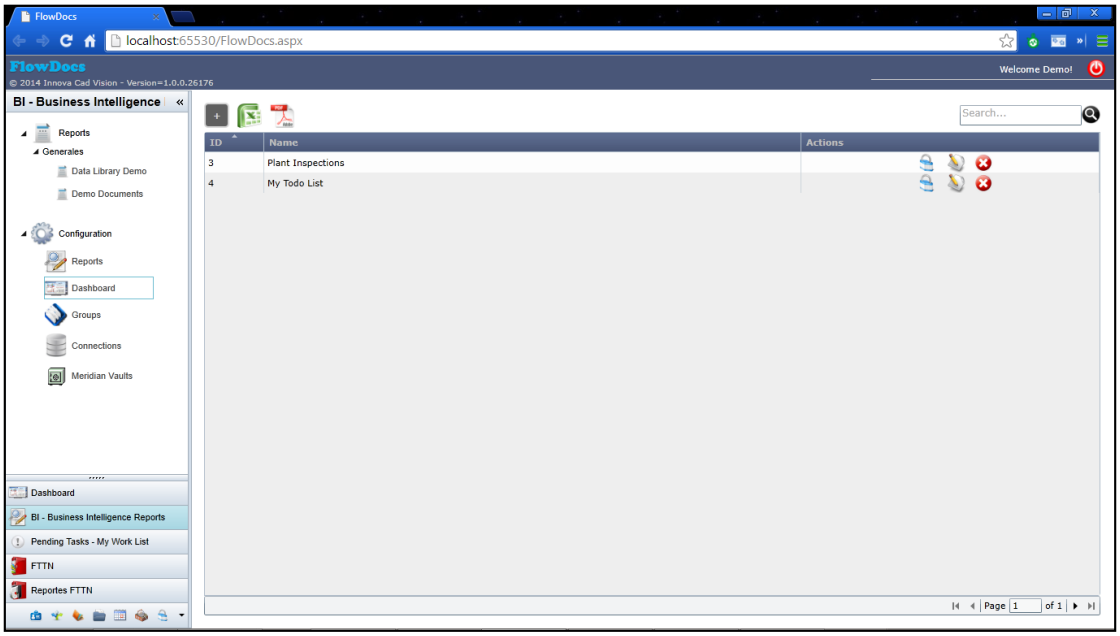
Dashboard Configuration

System Dashboards can be configure by user accessing to Reports Configuration in left menu after pressing on 

button.



After user action, system will show screen (previous image) with all the configured dashboards with the possibility to create a new one, edit, delete or define visibility for each dashboard.

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New Dashboard

To create a new Dashboard, user must press on . New Dashboard window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.

Name

Name of the dashboard that represents the groups of reports configured.

Items

List of reports of the dashboard. To add an item, press on **add item** button.

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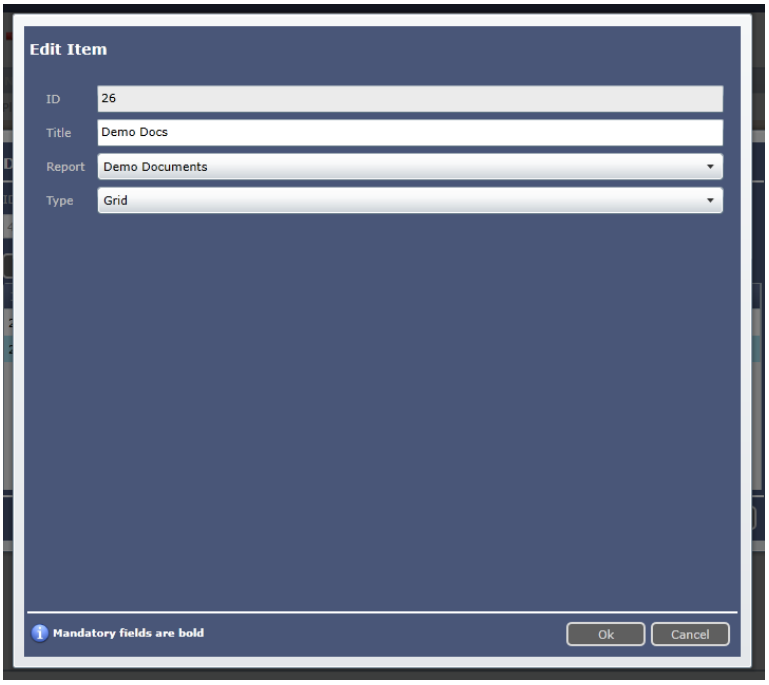
Add/Edit Grid Item

An item is composed by a report defined on report configuration. The data can be show as a grid and is very simple, must select the report to show, input the title and select the grid type as shown in image below.



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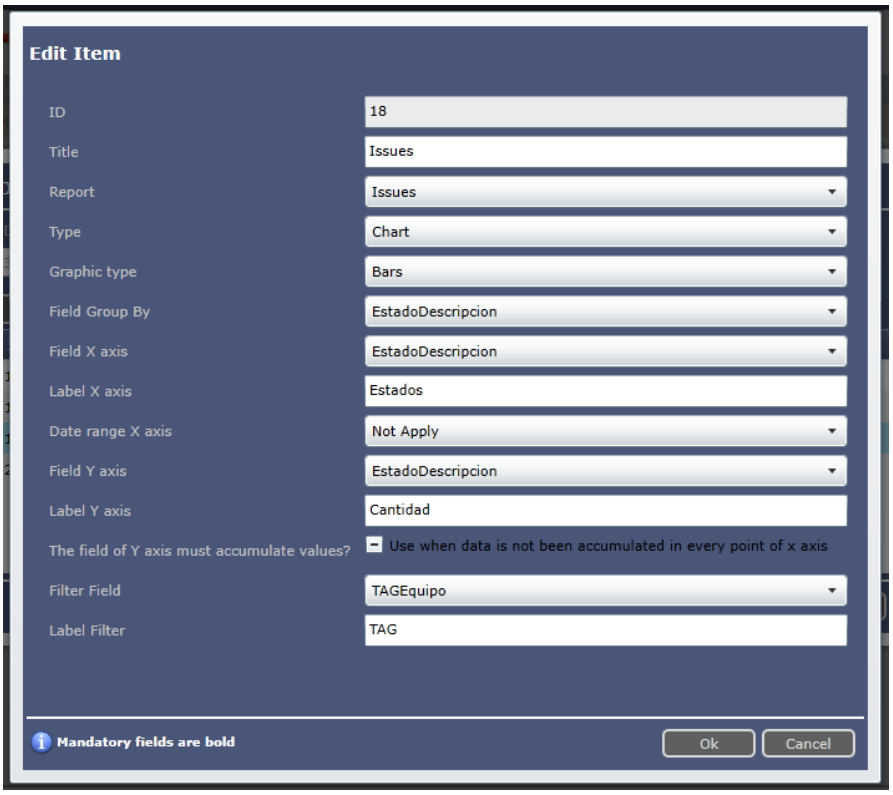
Add/Edit Chart Item

An item is composed by a report defined on report configuration. The data can be show as a chart.



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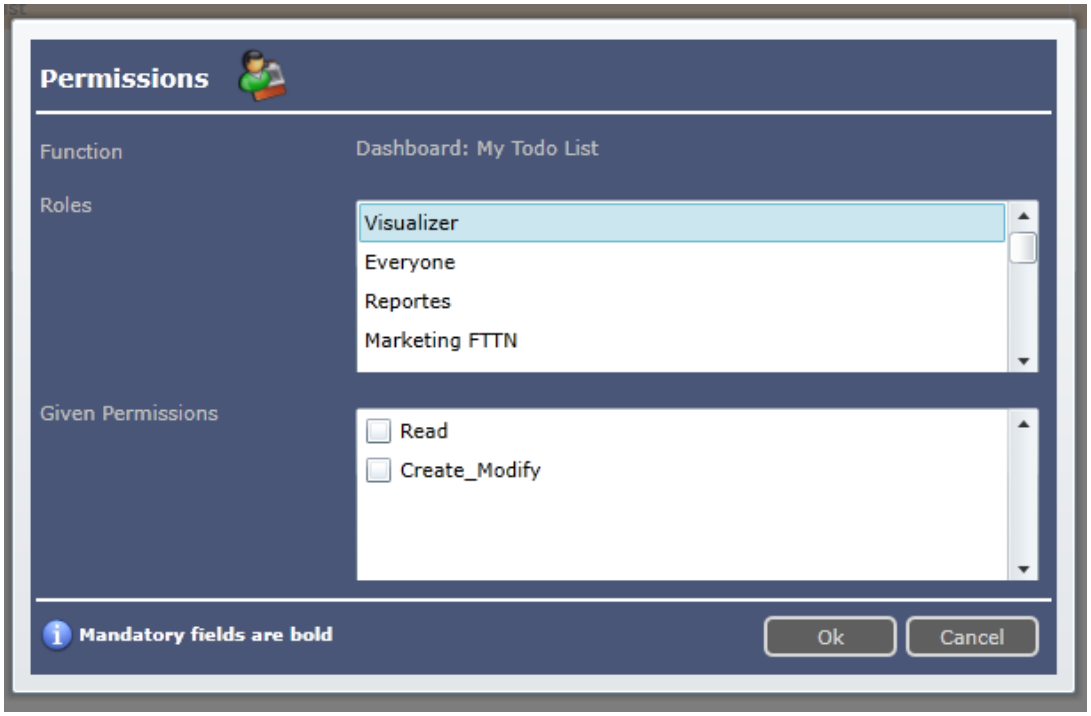
Setting Dashboard Security

User can define which roles can view the dashboard. For this, on dashboard row user must click on to access Dashboards Permissions.

After this action, Dashboard Permissions window will pop up as image below.



Selecting each role, user can define if dashboard can be accessible for the selected role by checking read option. This function is accessible for users that can create/update dashboards.

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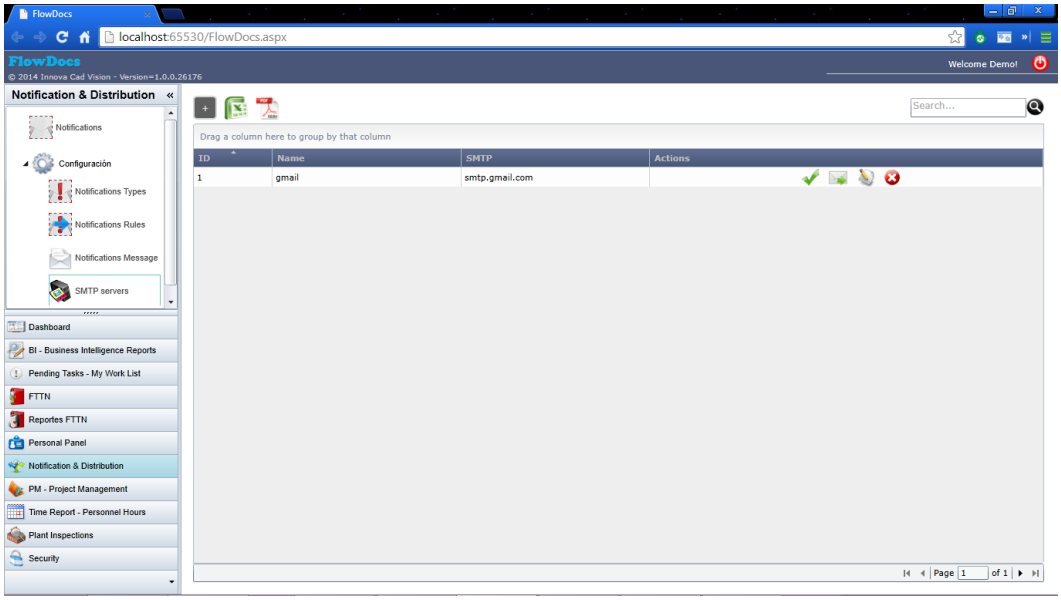
NOTIFICATIONS

Notifications module, allows user to notify and distribute work easily. It allows user to define types, for create a notification on any milestone of the process and to define rules to manage notifications in automatic way. This module also works with Sql Server Stored procedures, useful to create notifications in Meridian and also a service that can be run as a Windows server task to send the notifications.

SMTP Servers

First of all, user need to configure SMTP servers to send notifications.



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New SMTP Server configuration

To create a new SMTP Server configuration, user must press on . New SMTP Server Configuration window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.

This configuration depends on SMTP.

Test SMTP Connection

User can test if SMTP is valid by clicking on Test Connection button in CRUD or in SMTP connections list by clicking Check image (see image below).

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Test E-mail sending

User can test if the SMTP configuration is correct sending an email. This option is on SMTP configurations list by Clicking on **Send Email** image (see image below).

Complete information and send email to see if email arrives

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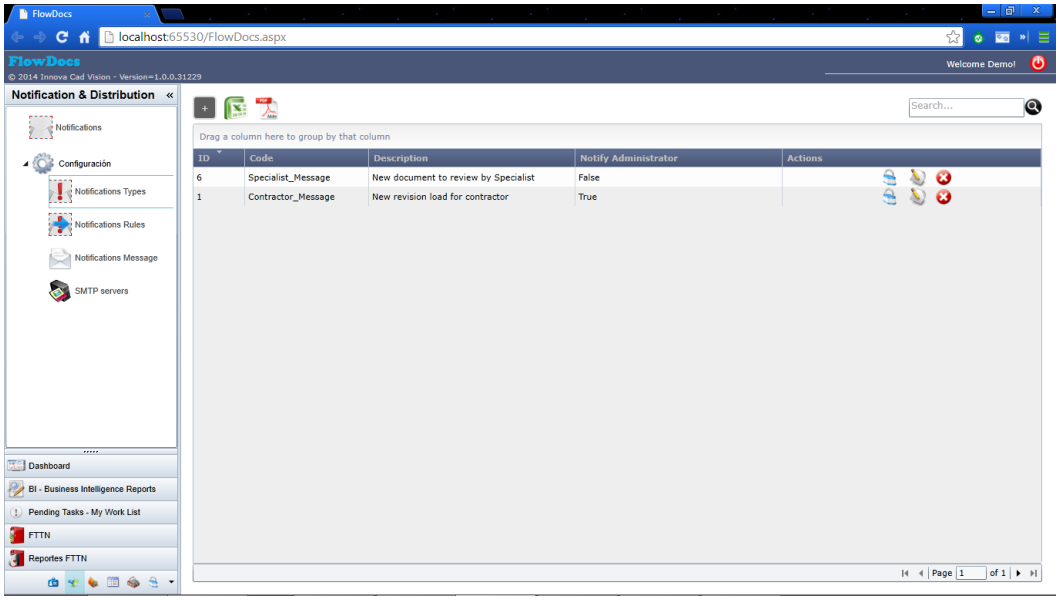
Notification Types

User can define notifications types to use in different process. Types defines, which roles must be notified when a notification of this type is created, defines subject, body and if SMTP administrator must be notified when this occurs.



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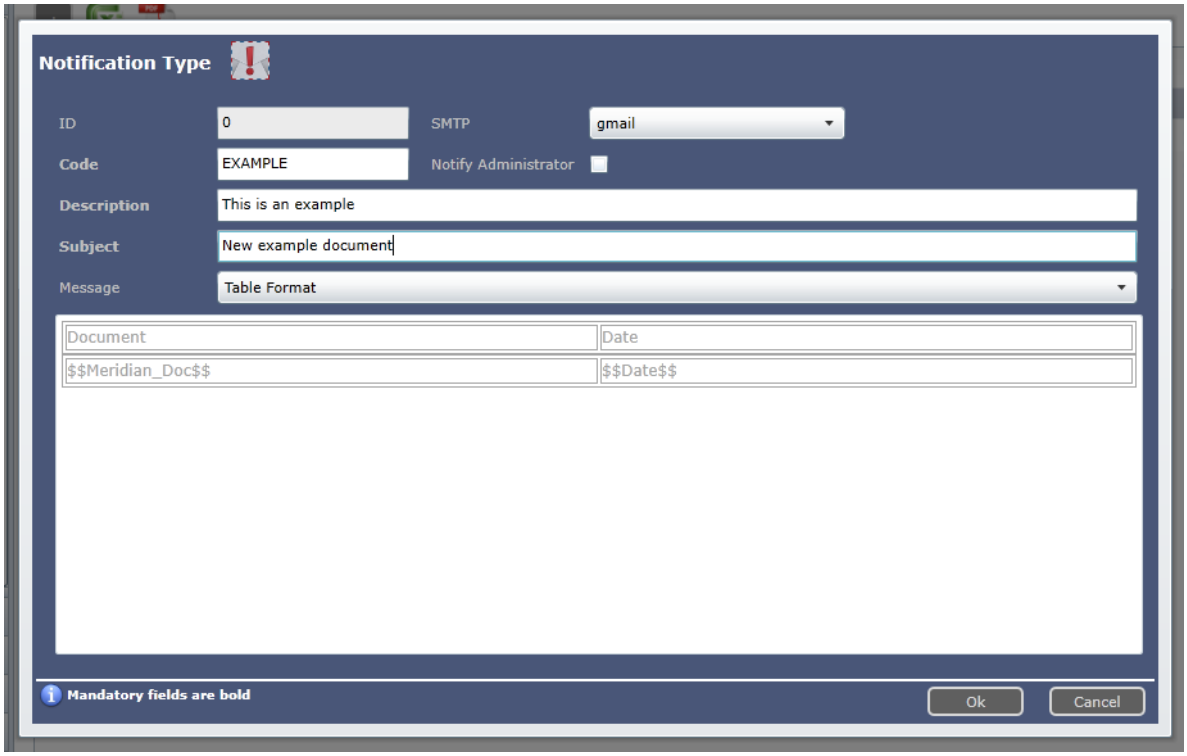
New Notification Type

To create a new Notification Type, user must press on . New Notification type window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.



Code The is use to create the notification according the Type.

Note: In Meridian, user can call an Stored procedure as **AddNotification(*Code, Vars, delimiter*)** where **Code** is Notification Type code, **Vars** is a String containing pair variable/value, for example, vars can be '$$Meridian_Doc$$=Example.doc;$$Date$$=Now' and **delimiter** will be ';'

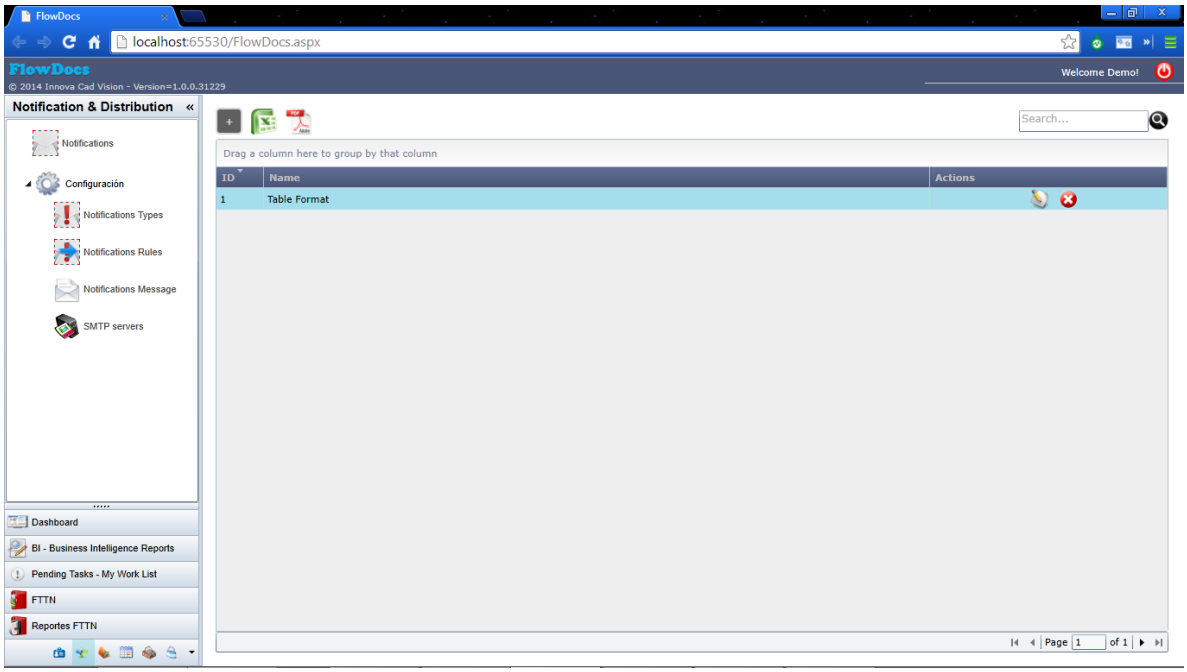
Description is a text to explain notification type usage

Subject is the subject of the email to send

Message is the message format use for this notification

Notification Message Format

User can define a message format to use in different kinds of notifications. This message format allows to generate a format, for example, to notify users of the new documents despite the different groups to notify.



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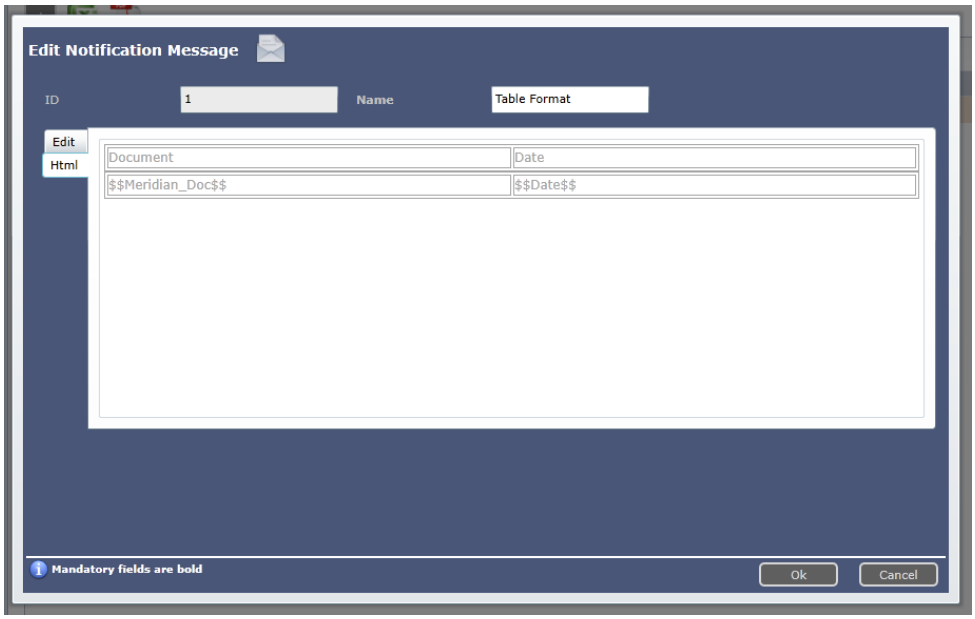
New message format

To create a new message format, user must press on . New message format window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.

If user wants to see message format result, must press on html tab to see if the html generated is fine.



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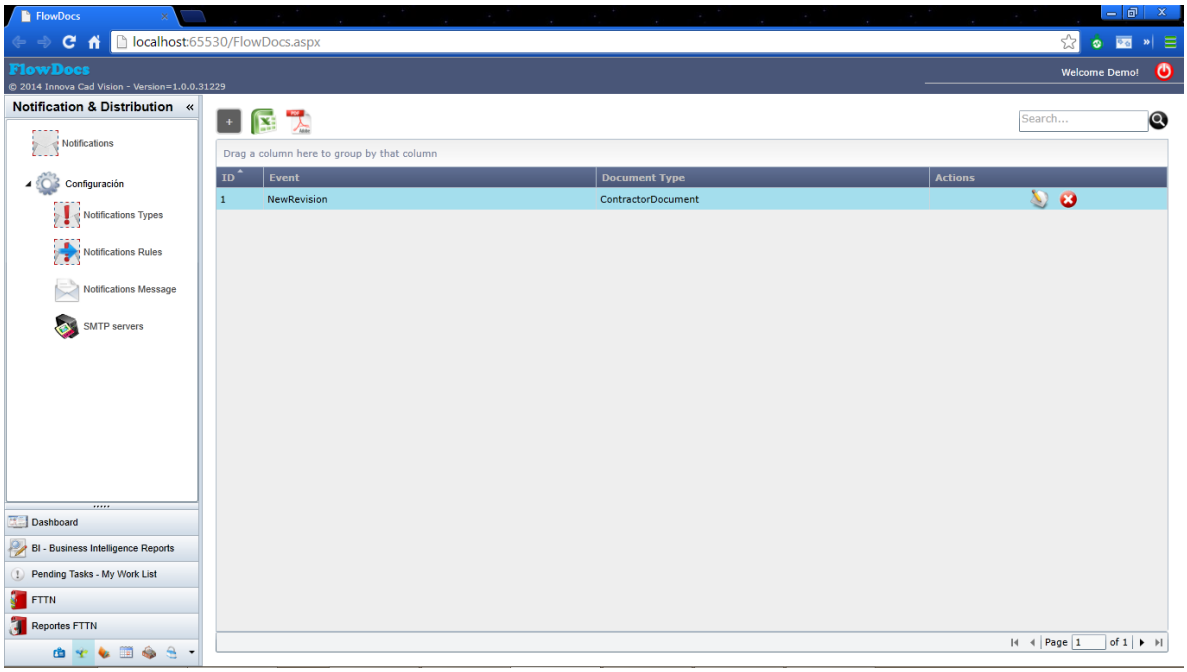
Notification Rule

A Rule is use to call notification creation in automatic way. If user defines a set of rules, and calls this rules from the code, the user can manage which notification type call for each rule depending on functional implementation.



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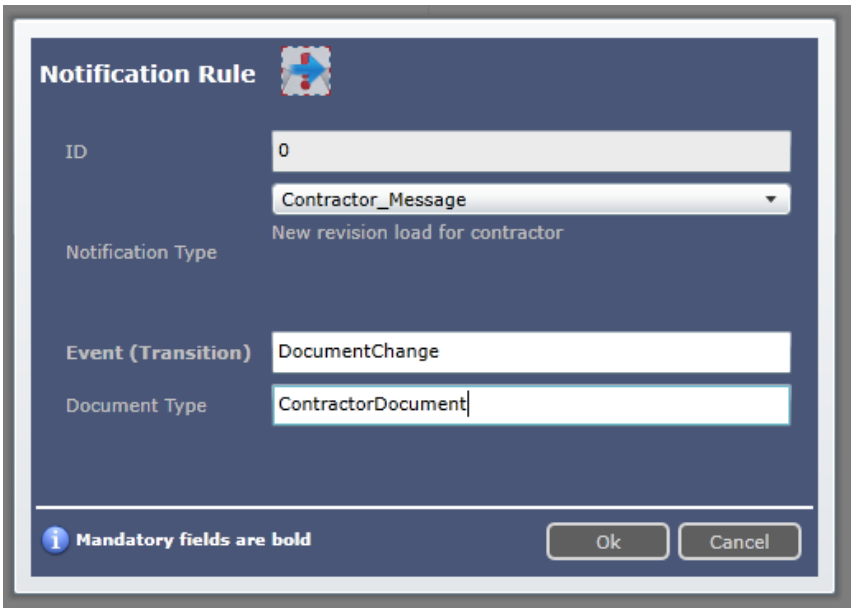
New Notification Rule

To create a new rule, user must press on . New notification rule window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.



Notification Type Select the notification type to execute for this rule.

Event (Transition) Is an event or workflow transition that occurs in system. In case of Meridian, this can be, for example, the event after new document.

Document Type is a variable that depends on document type in case of Meridian but can be use as other variable.

> **Note:** In Meridian, on event After New Document, system can call an Stored procedure as **AddNotificationRule(*Event, DocumentType, Vars, Delimiter*)** where **Event** is AfterNewDocument, **DocumentType** is the document Type that has been created, **Vars** can be '$$Meridian_Doc$$=Example.doc;$$Date$$=Now' and **Delimiter** will be ';'. In this case, on every Meridian implementation the notification can be different depending on functional needs without modifying Meridian code.

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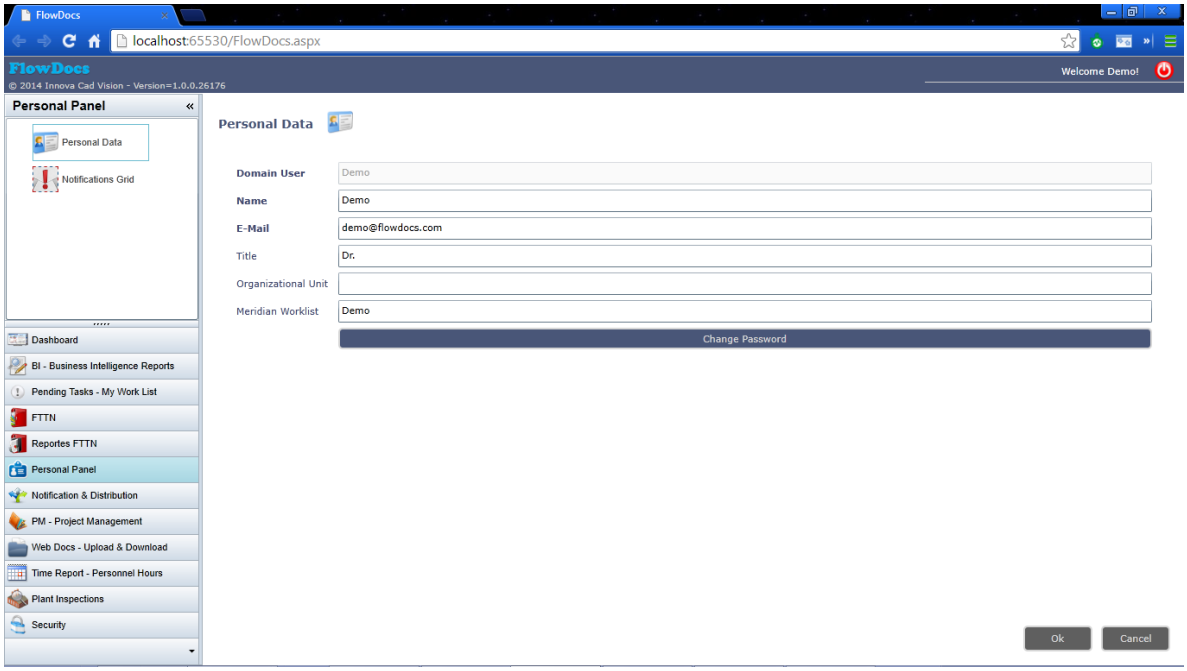
Personal Panel

The personal panel contains the user personal data and allows user to manage his password, email and others. Also user can turn on/off notifications that are not mandatory.

User Personal Data

User can edit its own personal information or change his password.



Change Password

User must press on Change Password button and complete data required in change password form.

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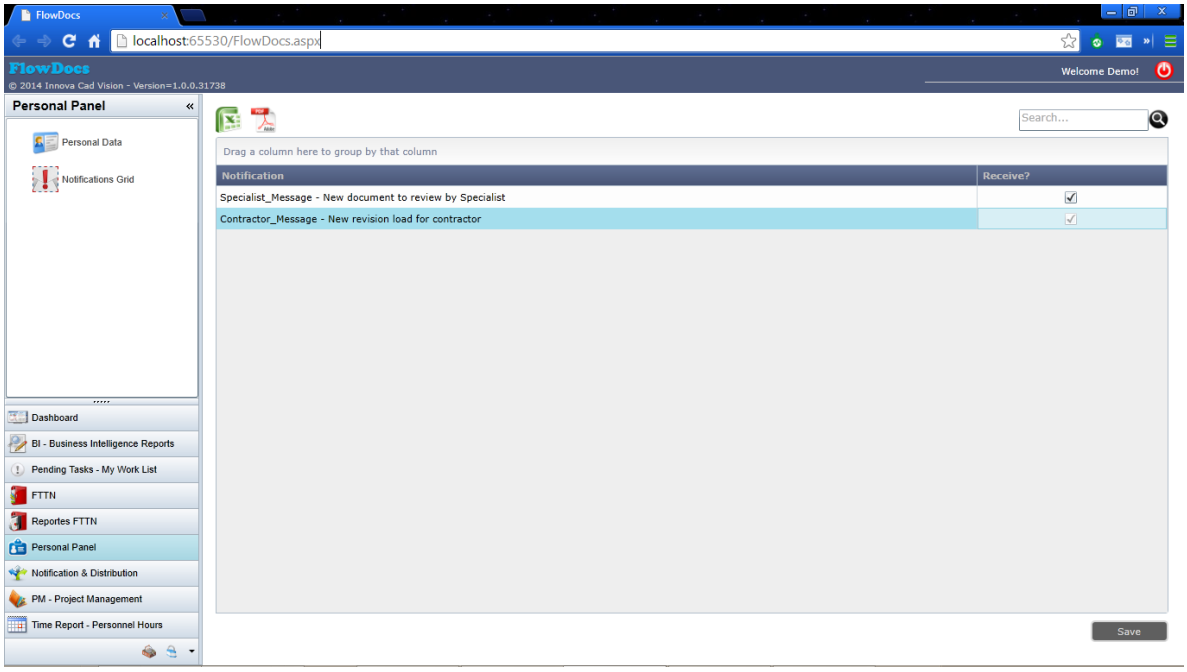
Notifications grid

The notification grid, contains all the notifications that user must receive (mandatory notifications) or can receive.



Turn on/off Notification

User can uncheck every enabled notification. Mandatory notifications have disabled checkbox.

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